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ABSTRACT

This instructor's guide and student activity packet (together with a slide/tape presentation not available here) comprise a module for the postsecondary office occupations education competency area of handling office callers and appointments. Modules for other competency areas are available separately (see note). The purpose stated for the module is to help students learn to work effectively with the public in an office setting. The instructor's guide includes an introduction, performance objectives, special notes to instructor, time and facilities, suggestions for discussion, optional student activities, suggested evaluation criteria, keys to student activities, the narrative for the slide/tape presentation, and a list of resources and references. Contents of the student activity packet include an introduction, performance objectives, necessary resource materials, directions for completing the activities provided, a student checksheet for taking notes during the slide/tape presentation, and the activities to be completed in order to master the competencies on which the module is based. (YLB)

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OFFICE OCCUPATIONS

ED222723

HANDLING OFFICE CALLERS AND APPOINTMENTS

Audiovisual Package

Instructor's Guide
Student Activity Packet

Prepared by Dr. James J. Zukowski

Published by
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HANDLING OFFICE CALLERS AND APPOINTMENTS

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INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each package includes an instructor's guide with general instructions for use by an individual or in a group setting, the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains solutions for the activities completed by the students and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. As a result, the students should find the material practical and job-related.

ACKNOWLEDGMENTS

We extend special thanks to the following Dallas County Community College District personnel for their service as Advisory Committee Members and critical evaluators for this project:

Linda Coffey, District Director of Occupational Education

Patsy Blankenship, North Lake College

Sharon Burton, Brookhaven College

Earlyne Purdy, Eastfield College

In addition to these specific individuals, other selected postsecondary business and office occupations instructors in Texas community colleges have also critically reviewed the materials in their draft form and have provided valuable input for assuring that the final product be as realistic and job-oriented as possible.

Appreciation is also given to the following businesses and institutions which allowed our writers and photographers access to their facilities. It is through their cooperation that the slides which accompany these packages show actual office settings:

Brookhaven College

Office Occupations Laboratory

Job Placement Center

East Texas State University

Business Education Department

Xerox Corporation, Dallas

Sun Production Company, Dallas

Pacific Mutual Insurance Company, Dallas

Finally, special appreciation is extended to Joyce Johnson, East Texas State University, and David MacAnally, Paris Junior College, for their input in the initial development of these materials.

INSTRUCTOR'S GUIDE

HANDLING OFFICE CALLERS AND APPOINTMENTS

INSTRUCTOR'S GUIDE

GENERAL INSTRUCTIONS

Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available:

Projector
Projection Screen
Cassette Recorder

Make sure that all equipment is working properly.

Preparations Before Class

There are some things that you should do before showing the slide/tape presentation.

1. Preview slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentations.
3. Make seating arrangements so that every student can see the screen.
4. Allow enough time to show the presentation in its entirety.
5. If you use handouts, be sure they are distributed after the presentation.

Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. After showing the slide/tape presentation, ask students to give highlights in their own words.
3. If necessary, show the entire presentation or parts of it a second time to emphasize points important to the successful
4. After showing the presentation, make arrangements for students to use it on an individual basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.
2. Check equipment to make sure it is working properly.
3. Demonstrate or have someone demonstrate the procedure for using equipment.
4. Tell students to view the slide/tape presentation or parts of it for reinforcement.
5. Have students view the slide/tape presentation.
6. Ask students to summarize the slide/tape presentation.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by the frame, being careful not to touch the film.
2. Use the side of the tape which is compatible with the equipment you are using. One side of the cassette tape contains an audible advance and the other side contains an inaudible advance.
3. Arrange the slides in the slide tray in sequential order to insure that each projection is viewed from left to right.
4. Insert the cassette tape in the recorder/player.
5. Rewind the cassette tape to make sure that it will start at the beginning.
6. Turn on the slide projector. The first slide should be projected on the screen.
7. Start the cassette player.
8. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.)

Student Checksheets

Student checksheets provide a convenient means for students to take notes while viewing the slide/tape presentations. The points identified on the student checksheet are those the student will have to be familiar with in order to complete the activities provided.

Resource Sheets

Resource sheets provide information essential for reinforcing the competency requirements of the slide/tape presentation.

Students should read the resource sheets as instructed in each student activity packet.

Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

HANDLING OFFICE CALLERS AND APPOINTMENTS

INSTRUCTOR'S GUIDE

SPECIFIC INSTRUCTIONS

Introduction to Slide/Tape Presentation

Handling Office Callers and Appointments is an audiovisual aid developed to help students learn to work effectively with the public in an office setting.

This slide/tape package consists of 43 full-color slides, a cassette tape, an instructor's guide, and a student activity packet that could be used as primary or supplementary instructional tools in an office/secretarial procedures class.

Script

A description of each slide and its narration can be found at the end of the Specific Instructions.

Time and Facilities

Approximately 10 to 15 minutes of one class period should be set aside for introduction and presentation of the slide/tape, which can be shown in any room that can be sufficiently darkened or that has individual carrels equipped with slide carousels and cassette tape recorders. In addition, students should be able to complete the 3 activities in approximately 3-4 hours.

Suggested Class Discussion (for use in a group setting)

After the slide/tape has been presented, each of the provided activities should be discussed. Students should be urged to tell of any situations in which they have been required to record vital information on an individual.

In order to encourage discussion and cooperation among students, the instructor may wish to assign students to work on Activity 3 in small groups of 3-4 students.

After the students have completed the three activities in the Student Activity Packet and their work has been evaluated, each exercise should be discussed. Discussion should center on what could go wrong in an office if logs and appointment schedules are not kept accurately.

Suggested Student Activities

Three activities are provided in the Student Activity Packet. These activities are designed to reinforce the material presented on the slide/tape and to give the students an opportunity to record necessary information on visitor logs and appointment schedules and to analyze situations that occur in the day-to-day operation of a business office.

Since the student activity packet is limited in the number of exercises provided, the instructor may wish to supplement the packet with exercises in which students maintain office caller logs and schedules for a variety of employers. To further reinforce the mastery of this competency, students might be required to visit a business office where visitor logs and appointment schedules are a vital portion of an efficient office operation, to learn first-hand how these items are used in an actual office setting.

Suggested Evaluation Criteria

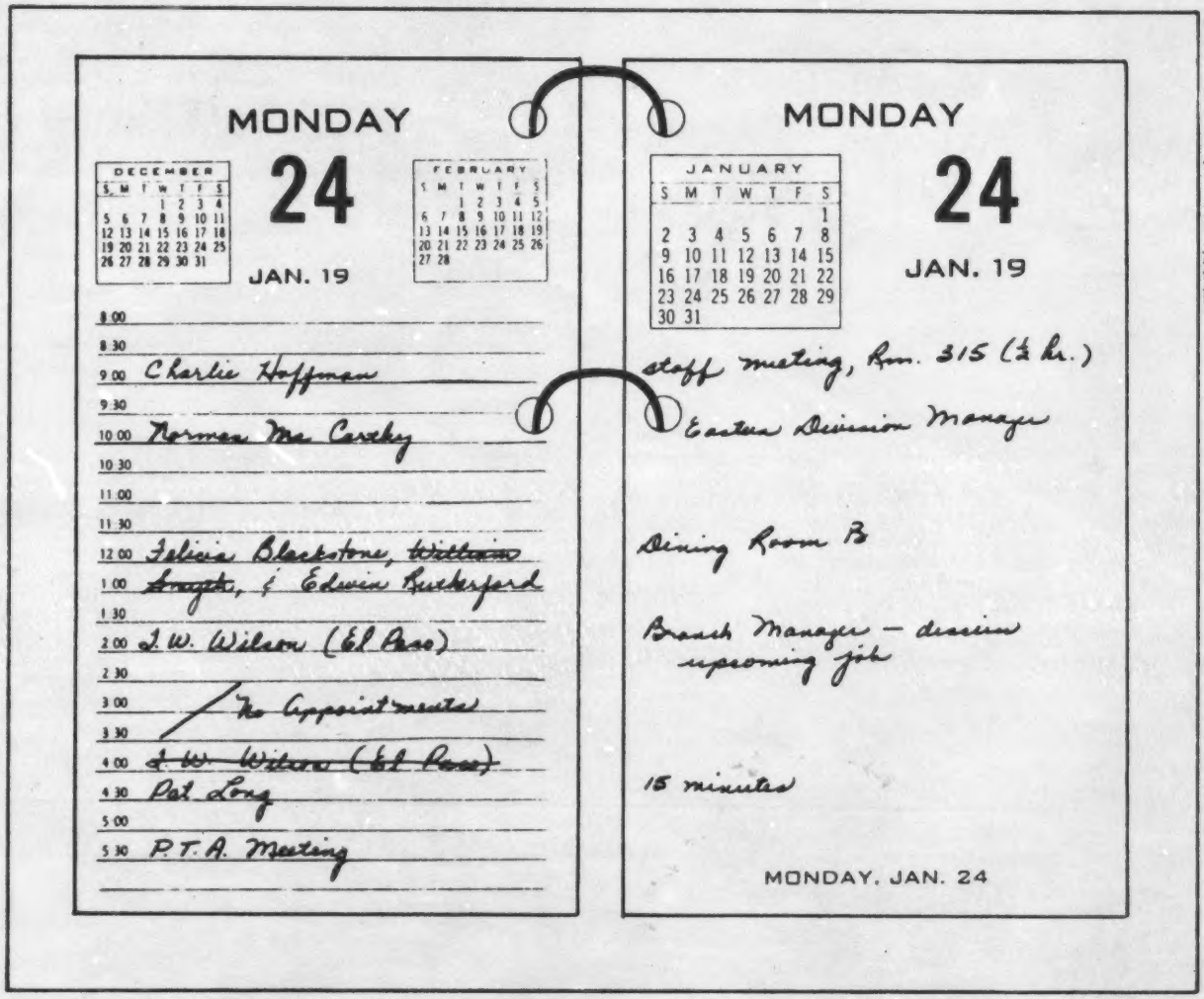
The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in this package.

1. Completion time for activities
   a. Completion time less than suggested time limits _____
   b. Completion time within suggested time limits _____
   c. Completion time exceeded suggested time limits _____
2. Completion of student activities
   a. Activities completed without error _____
   b. Activities completed with a minimal amount of errors _____
   c. Activities not successfully completed within specified time, and remedial assistance needed _____
3. Classroom discussion (only when package is used in group setting)
   a. Excellent (Student took a leadership position.) _____
   b. Good (Student contributed and explained satisfactorily.) _____
   c. Fair (Student contributed but explanations were less than satisfactory.) _____
   d. Poor (Student contributed little and offered no explanations.) _____
   e. Student did not participate. _____

KEY

Activity 1

APPOINTMENT CALENDAR


MONDAY
24
JAN. 19
DECEMBER
S M T W T F S
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31
FEBRUARY
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28
8 00
8 30
9 00 Charlie Hoffman
9 30
10 00 Norman McCarthy
10 30
11 00
11 30
12 00 Felicia Blackstone, William
1 00 Smyth, & Edwin Rutherford
1 30
2 00 J. W. Wilson (El Paso)
2 30
3 00 No Appointments
3 30
4 00 J. W. Wilson (El Paso)
4 30 Pat Long
5 00
5 30 P.T.A. Meeting
MONDAY
JANUARY
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
24
JAN. 19
staff meeting, Rm. 315 (½ hr.)
Eastern Division Manager
Dining Room B
Branch Managers – discuss upcoming job
15 minutes
MONDAY, JAN. 24

KEY

Activity 1

APPOINTMENT SCHEDULE, JANUARY 24, 19___

TIME	APPOINTMENTS	MEMO
9:00	Charlie Hoffman	Room 315 (Staff meeting) ½ hr
9:30		
10:00	Norman McCarthy	Eastern Division Manager (letter)
10:30		
11:00		
11:30		
12:00	Felicia Blackstone, ~~William Smyth~~, & Edwin Rutherford	Dining Room B
12:30		Mr. Smyth called 11-1 to cancel
1:00		
1:30		
2:00	T. W. Wilson	re: discuss upcoming job El Paso Branch Manager
2:30		
3:00	No Appointments	
3:30		
4:00	~~T. W. Wilson~~	~~El Paso re: discuss job~~
4:30	Pat Long	research associate
5:00		
5:30	PTA meeting	

KEY

Activity 2

VISITOR'S LOG

Date	Name	Firm (Include Telephone No.)	App't. Yes/No	Purpose of Visit	Time of Arrival	Time Escorted	Time Departed
1/24	Norman McCarthy	Eastern Division Manager Sunshine Oil (845-7913)	Yes	Past-due Accounts	9:50	10:05	10:35
1/24	Jan Michael	Investment Counselors, Inc. (742-6666)	No	Financial Matters	10:10		10:33
1/24	Donna P. Lloyd	Lloyd and Ogden Products, Inc. (886-5141)	No	Personal Matter	10:15	10:40	11:40
1/24	T. W. Wilson	El Paso Branch Manager Sunshine Oil (456-7890)	Yes	Upcoming Project	1:50	2:00	3:10
1/24	Pat Long	Research Associate (ext. 5120)	Yes	Company Matters	3:30		3:40
1/24	Adam Goldsmith	Lanzy's Service Stations Paris (123-4567)	No	Promotion Strategy	4:00	4:05	4:25
1/24	Pat Long	Research Associate (ext. 5120)	Yes	Company Matters	4:25	4:30	5:20

KEY

Activity 3

1. In Activity 1 you scheduled Ms. Payne to be in a staff meeting at 9 a.m. on January 24 for approximately 30 minutes. Why is there no entry on your Visitors' Log for this meeting?

   THERE IS NO ENTRY ON THE VISITOR'S LOG FOR THE 9 A.M. STAFF MEETING BECAUSE THE MEETING TOOK PLACE IN ROOM 315 RATHER THAN IN MS. PAYNE'S OFFICE. SINCE THE STAFF MEMBERS DID NOT ARRIVE AT THE OFFICE, THEY COULD NOT TECHNICALLY BE CLASSIFIED AS "VISITORS."

2. Jan Michael of Investment Counselors, Inc., arrived at Ms. Payne's office at 10:10 a.m. but left without seeing Ms. Payne. What probably happened that caused Ms. Michael to wait for 10 minutes and then leave before seeing Ms. Payne?

   JAN MICHAEL ARRIVED TO SEE MS. PAYNE BUT DID NOT HAVE A PRE-ARRANGED APPOINTMENT. SINCE MS. PAYNE WAS ALREADY MEETING WITH NORMAN MCCARTHY, JAN MICHAEL WAS PROBABLY GIVEN THE OPTION OF SCHEDULING AN APPOINTMENT OR WAITING TO LEARN IF SHE COULD BE "SQUEEZED IN." AFTER WAITING 10 MINUTES IT PROBABLY BECAME APPARENT THAT MS. PAYNE WAS GOING TO BE BUSY FOR A LONGER PERIOD OF TIME THAN MS. MICHAEL WAS WILLING OR ABLE TO WAIT.

3. Donna P. Lloyd of Lloyd and Ogden Products, Inc., arrived at Ms. Payne's office at 10:15 a.m. and met with Ms. Payne at 10:40 a.m. Since Ms. Lloyd did not have a prearranged appointment, why was she able to see Ms. Payne?

   EVEN THOUGH DONNA P. LLOYD DID NOT HAVE AN APPOINTMENT, SHE WAS ABLE TO MEET WITH MS. PAYNE AS THE RESULT OF A COMBINATION OF FACTORS:

   1. SHE WAS WILLING TO WAIT UNTIL MS. PAYNE WAS AVAILABLE.

   2. MS. PAYNE WAS AVAILABLE FROM THE TERMINATION OF HER MEETING WITH NORMAN MCCARTHY UNTIL THE NOON LUNCHEON MEETING WITH MEMBERS OF THE ASSOCIATION OF ARCHITECTS.

   3. MS. PAYNE APPARENTLY FELT THAT THE REASONS FOR MS. LLOYD'S REQUEST FOR A MEETING WERE IMPORTANT ENOUGH FOR THE MEETING TO TAKE PLACE IMMEDIATELY.

4. In Activity 1 you scheduled a luncheon meeting for Ms. Payne with three members of the local Association of Architects. Why is there no notation of this meeting on your Visitors' Log for January 24?

   THE LUNCHEON MEETING WITH THE MEMBERS OF THE ASSOCIATION OF ARCHITECTS IS NOT INCLUDED IN THE VISITORS' LOG BECAUSE THE MEETING TOOK PLACE, AS SCHEDULED, AWAY FROM THE OFFICE; THEREFORE, THE PARTICIPANTS DID NOT "VISIT" MS. PAYNE'S OFFICE.

5. Why was Pat Long, who arrived at 3:30, not able to see Ms. Payne until 4:30?

   PAT LONG WAS NOT ABLE TO SEE MS. PAYNE AT 3:30 because her APPOINTMENT HAD BEEN PREARRANGED FOR 4:30, A TIME WITH WHICH MS. PAYNE APPARENTLY FELT MOST COMFORTABLE.

6. Since Adam Goldsmith of Lanzy's Service Stations did not have a prearranged appointment, what had occurred that enabled him to see Ms. Payne shortly after he arrived at 4 p.m.?

   EVEN THOUGH HE DID NOT HAVE A PREARRANGED APPOINTMENT, ADAM GOLDSMITH OF LANZY'S SERVICE STATIONS WAS ABLE TO MEET WITH MS. PAYNE SHORTLY AFTER HE ARRIVED AT 4 P.M. FOR TWO REASONS:

   1. MS. WILSON'S ORIGINAL APPOINTMENT AT 4 P.M. HAD BEEN CHANGED TO 2 P.M., SO MS. PAYNE WAS AVAILABLE WHEN GOLDSMITH ARRIVED.

   2. MS. PAYNE APPARENTLY FELT THAT GOLDSMITH HAD TRAVELED FAR ENOUGH AND WAS AN IMPORTANT ENOUGH CLIENT TO WARRANT AN IMMEDIATE APPOINTMENT.

7. On January 7, Ms. Payne had asked you to put a reminder on her calendar about a PTA meeting at 5:30 p.m. on January 24. Since Pat Long did not depart until 5:20 p.m., Ms. Payne probably was not able to attend this meeting. What was your responsibility for keeping Ms. Payne on schedule so that she could attend this meeting?

   THE SECRETARY WAS RESPONSIBLE FOR SIMPLY REMINDING MS. PAYNE, EITHER ORALLY OR BY NOTE, THAT THE PTA MEETING WAS ON HER CALENDAR. ONCE THAT REMINDER WAS GIVEN, THE SECRETARY'S RESPONSIBILITY ENDED.

FRAME	ILLUSTRATION	NARRATIVE
1	Focus/Synchronize Slide	
2	Title Slide	
3	Photo of a secretary answering the telephone	Office employees at all levels and in all positions must be skilled in working with the public. However, because secretaries and receptionists work directly with clients more often than do other office employees, these individuals must be especially aware of their roles in maintaining good customer relations. In fact, the secretary or receptionist frequently provides the first impression a client receives about a company when the client contacts an office to arrange an appointment.
4	Illustration of a secretary greeting an unattractive, sloppily dressed visitor	Because first impressions are often lasting ones, it is important to remember that you, as an office employee, have the power to influence, either positively or negatively, the goodwill of the firm for which you work. Therefore, all office callers should be treated with courtesy and respect, regardless of the way they look or the positions they hold.
5	Photo of a secretary recording an appointment made over the telephone	As was stated previously, your first contact with a client will probably occur when the client calls upon you to arrange an appointment with your employer. This request for an appointment will usually be made over the telephone; but appointments might also be requested in person or in writing. Regardless of the method by which a person requests an appointment, however, it will be your responsibility to keep a record of all meetings that are scheduled.
6	Illustration of an appointment card	Scheduling appointments serves several purposes: it allows both you and your employer to arrange and maintain an organized schedule for each work day; it provides a means of keeping a record of individuals with whom your employer does business; and it ensures that an office visitor's waiting time will be kept to a minimum.

FRAME	ILLUSTRATION	NARRATIVE
7	Ways Appointments Are Scheduled 1. Over the telephone 2. In person 3. In writing (a letter) Reasons Appointments Are Scheduled 1. To arrange and maintain an organized daily schedule 2. To keep a record of clients 3. To keep office visitors' waiting time to a minimum	Now that you are familiar with the ways in which appointments are scheduled and the reasons for scheduling them, it's time to take a close look at exactly what takes place when an appointment is arranged.
8	Illustration of an appointment calendar	In order to schedule appointments in the most efficient way possible, most secretaries keep a desk calendar or an appointment sheet on which they record the meetings and appointments of their employers.
9	Photo of secretary's desk calendar Photo of employer's appointment calendar	Most secretaries also maintain a separate appointment calendar which remains on the employer's desk. This second calendar allows an employer to know what is scheduled for each day without having to check with the secretary.
10	Photo of a secretary comparing the two appointment calendars and bringing one of them up to date	Of course, the secretary must compare and update the two calendars at least once each day to avoid potential conflicts in scheduling.
11	Photo of a secretary writing an appointment into both calendars	Conflicts can occur when both you, as the secretary, and your employer schedule appointments. Therefore, if you are scheduling someone to meet with your employer, you must record the appointment on both calendars. In fact, both calendars should be checked at the time the appointment is being scheduled. In this way, you reduce the chance that you may have to change an appointment once it has been made.

FRAME	ILLUSTRATION	NARRATIVE
12	Appointment calendar notation with the time of the appointment highlighted	If an appointment calendar is to serve a useful purpose, you will need to record some specific information about each person who requests a meeting with your employer. You must note (1) the exact time at which an appointment is to take place;
13	Appointment calendar notation with the name and company of the caller highlighted	(2) the name of the caller and the company represented;
14	Appointment calendar notation with the purpose of the appointment highlighted	and (3) the purpose, if known, of the appointment.
15	Appointment calendar notation with the place of the meeting highlighted	If the meeting is scheduled for somewhere other than the employer's office, this information must also be recorded.
16	Appointment calendar notation with the client's telephone number highlighted	In addition, you might want to make a note of the caller's telephone number for possible use at a later date.
17	Photo of a secretary writing in an appointment on a calendar	When entering an appointment notation on a calendar or schedule sheet, your job will be made easier if you use these suggestions: 1. Use pencil rather than pen so that needed corrections can be made easily.
18	Illustration of an appointment notation that has been lined out	2. If an appointment must be canceled, neatly draw a line through the name of the person for whom the appointment was scheduled.
19	Illustration of an appointment calendar page with time period blocked out for no appointments	3. Make notations on your calendar of times during which your employer wishes not to have appointments scheduled.
	23	24

FRAME	ILLUSTRATION	NARRATIVE
20	Photo of a secretary writing a caller's name phonetically	4. Ask to have the caller's surname spelled. If the name is difficult to pronounce, or the pronounciation does not correspond directly to the spelling, write the name again--this time, writing it the way it sounds.
21	Illustration of an appointment notation lined up with a time notation	5. Make sure that you record the name of the caller, the company, and the telephone number right next to the proper time so that the appointment time you show on the calendar is the same as the time you tell the caller to be at your office.
22	Photo of a secretary confirming an appointment	Each appointment should be confirmed at the same time it is being made and recorded on the appointment calendar. To confirm an appointment, restate to the caller the date, time, place, and purpose of the meeting, to be sure that both you and the person wanting the appointment are in agreement.
23	Photo of an appointment book page with an appointment notation crossed out and written back in at a later time	If at a later date a conflict arises and the appointment has to be canceled or rescheduled, you will have to contact the client and make the necessary changes.
24	Illustration of original appointment	In order to reschedule an appointment, find the client's telephone number in the original appointment listing.
25	Photo of a secretary talking on the telephone while looking at an appointment calendar	Then telephone the person for whom the appointment was scheduled, briefly explain the situation, and suggest dates and times at which the appointment could be rescheduled.
26	Photo of a secretary writing down a rescheduled appointment	Once a mutually convenient date and time have been agreed upon, record the necessary information in the appropriate place on the appointment calendar.
27	Secretary with a smile greeting an office visitor	In any business office you will encounter two types of office visitors--those who arrive because they have a prearranged appointment, and those who "drop in" without an appointment. Regardless of the category under which a visitor can be classified, you must be friendly and helpful.
28	Secretary speaking to an office visitor	Acknowledge the visitor's presence immediately through the use of a phrase such as "May I help you?"

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FRAME	ILLUSTRATION	NARRATIVE
29	Secretary writing appointment into appointment calendar	If the visitor does not have an appointment, determine the purpose of the visit and either arrange an appointment or refer the visitor to another person.
30	Secretary writing the visitor's name in a visitors' log	If the visitor has a prearranged appointment or is given an appointment, you should obtain the following information so that it can be relayed to your employer: (1) the individual's name and the company represented,
31	Secretary writing the visitor's telephone number in a visitors' log	(2) the telephone number at which the visitor can most easily be reached,
32	Secretary writing the name of the person to be seen in a visitors' log	(3) the name of the person the visitor wishes to see,
33	Secretary writing the name of the person to be seen in a visitors' log.	and (4) the purpose of the visit.
34	A visitors' log with a completed entry	In offices that closely monitor visitors to the company, recording of this information will be required; in other offices, this record will be used simply as a source of information for the secretary or receptionist who must introduce the visitor to company employees or who later may be asked to recall a particular office visitor.
35	Secretary writing in a visitors' log / Secretary writing information in a notebook	In many offices this record of visitors will be kept in a visitors' log. When a visitors' log is not available, the same information should be recorded in a notebook or on a pad of paper.
36	Secretary talking with employer	Once you have recorded the necessary information, you must inform your employer, either by telephone or by some other convenient method, that the visitor is waiting. At this time, you should also give your employer any pertinent information you have about the visitor.
37	Secretary offering coffee to a visitor	If there is going to be a delay, inform the visitor and make the wait as pleasant as possible. Offer the visitor coffee or magazines, if available, and direct the visitor to a comfortable chair in which to wait.

FRAME	ILLUSTRATION	NARRATIVE
38	Secretary talking with a visitor	If for some reason the visitor's waiting time must be further extended, offer the visitor the opportunity to reschedule the appointment.
39	Secretary escorting a visitor to an employer's office	Once your employer is available, escort the visitor to your employer's office and introduce the visitor.
40	Secretary introducing a visitor to an employer	When making the introduction, mention your employer's name first. For instance, you might say, "Mr. Smith, I'd like you to meet Ms. Lucas of the Chamber of Commerce." Since you would previously have informed Mr. Smith of the purpose of the visit, it would not be necessary to repeat that information.
41	Secretary seeing a visitor out	After the visitor is with your employer, you may return to your desk; your involvement is completed until you pleasantly show the visitor out of the office at the conclusion of the meeting.
42	Illustration of an appointment calendar Photo of a secretary talking with an office visitor	By keeping your appointment schedule accurate and up to date, and by handling office visitors with respect and courtesy, you will help your employer conduct business in a profitable, efficient manner.
43	Credits Slide	

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STUDENT ACTIVITY PACKET

HANDLING OFFICE CALLERS AND APPOINTMENTS

STUDENT ACTIVITY PACKET

Objective

To maintain an appointment calendar and a visitors' log

Introduction

All office employees come in contact with the public. Those employees who work directly with the public assume a major responsibility for maintaining good customer relations while, at the same time, promoting an organized, efficiently run office setting. In order to keep an office running smoothly, the office worker and the employer alike must be constantly aware of the kinds of activities scheduled for the current day as well as for the future. This awareness is dependent upon the skill of the office employee in keeping accurate, up-to-date records, such as appointment calendars and visitors' logs.

Purpose

After completing the exercises in this packet you will be able to accurately schedule, cancel, and change appointments and to keep an accurate office visitors' log.

Materials

*Student checksheet for use with slide/tape presentation
*Resource sheets for activities 1 and 2
*Activity sheets for activities 1, 2, and 3
Pen and pencil

*These materials are provided as a part of this activity packet.

Directions

This packet contains three activities. Each of these activities includes a specific description of the tasks you are required to do. To complete each of the activities, follow these steps:

1. Read carefully the instructions for each activity.

2. Complete the tasks in each activity in the order in which they are assigned.

3. Reread the directions for each task to make sure that the information recorded is accurate and up to date.

When you have completed all of the activities in this packet, submit them to your instructor for evaluation.

(NOTE: You may wish to use the completed activity sheets from Activity 1 as resources for completing Activity 2. You will also need to use the resource and activity sheets from Activity 2 to complete Activity 3.)

STUDENT CHECKSHEET

(To Be Used With Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The answers to the questions asked here will be useful when completing the activities that accompany this presentation.

1. In what three ways are appointments usually scheduled?

   a. _____

   b. _____

   c. _____

2. What three purposes does scheduling appointments serve?

   a. _____

   b. _____

   c. _____

3. What information should you record for each person for whom an appointment is scheduled?

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

4. What are the five suggestions you should follow when entering appointment notations on a calendar or schedule sheet?

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

5. When should appointments be confirmed?

6. How do you confirm an appointment?

7. What information must you request from each office visitor?

   a. _____

   b. _____

   c. _____

   d. _____

8. What two purposes does a Visitors' Log serve?

   a. _____

   b. _____

9. When introducing a visitor to your employer, whose name is mentioned first?

RESOURCE SHEET

Activity 1

You are employed as secretary to Pat Payne, Executive Vice President of Sunshine Oil in Dallas, Texas. As Ms. Payne's secretary you are responsible for scheduling appointments and maintaining an accurate, up-to-date appointment calendar. The following individuals have contacted you, on the dates indicated, to arrange appointments with Ms. Payne. Make the necessary entries on your appointment calendar (Activity Sheet 1-1) and on Ms. Payne's daily schedule (Activity Sheet 1-2).

APPOINTMENTS REQUESTED

January 1 — You receive a letter from Norman McCarthy, Eastern Division Manager, requesting an appointment at 10 a.m. on January 24. You are able to confirm the day and the hour.

January 9 — One of Ms. Payne's associates, Charlie Hoffman, calls to find out if Ms. Payne can meet with some of the staff in Room 315, on January 24, at 9 a.m. The meeting will require about a half hour.

January 14 — Ms. Payne asks you to arrange a luncheon meeting at noon on January 24 in Dining Room B with Felicia Blackstone, William Smyth, and Edwin Rutherford, who are all members of the local Association of Architects. You check with the three, learn that they are free for an hour-and-a-half luncheon, and schedule the meeting.

January 16 — Pat Long, one of the research associates in the technical division, calls to see if she can talk with Ms. Payne for approximately 15 minutes, late on the afternoon of January 24. You schedule an appointment for 4:30 p.m.

January 23 — A secretary to T. W. Wilson, Manager of Sunshine Oil's El Paso Office, calls from El Paso to see if Ms. Payne could meet with Mr. Wilson late in the afternoon of the next day. Mr. Wilson will be in your city and needs to discuss a job on which he will be working with Ms. Payne. Ms. Payne agrees to meet with Mr. Wilson at 4 p.m.

ADDITIONS, DELETIONS, AND CORRECTIONS

January 7 — Ms. Payne tells you to put a reminder on her calendar about a PTA meeting at 5:30 on the 24th.

January 11 — Ms. Payne asks you to be sure to leave from 3 p.m. to 4 p.m. on January 24 open since she will want to go over the figures on the work she will be doing with T. W. Wilson before she meets with him.

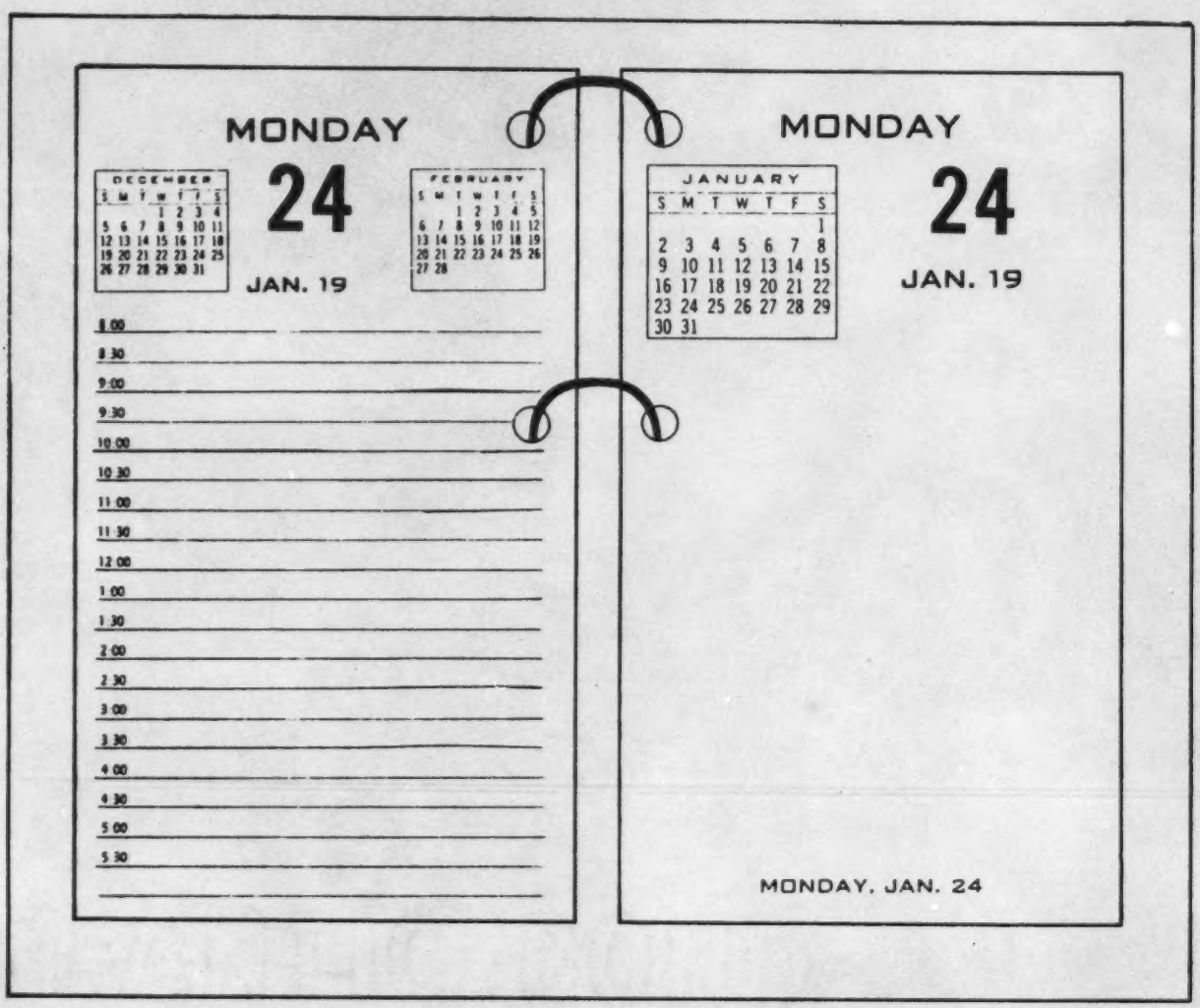
January 22 — Mr. Smyth calls to inform you that he cannot meet with Ms. Payne and the others on the 24th.

January 23 — Mr. Wilson's secretary calls from El Paso to tell you that Mr. Wilson will arrive earlier and needs to see Ms. Payne at 2 o'clock instead of at 4 p.m. on the 24th.

ACTIVITY SHEET 1-1

Activity 1

APPOINTMENT CALENDAR



ACTIVITY SHEET 1-2

Activity 1

DAILY APPOINTMENT SCHEDULE

January 24, 19__

TIME	APPOINTMENTS	MEMO
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00		
3:30		
4:00		
4:30		
5:00		
5:30		

RESOURCE SHEET

Activity 2

The following situations arose on January 24, the date on which the appointments and meetings described in Activity 1 were scheduled. It is the policy of Sunshine Oil that a record of all visitors to the offices of the various executives must be kept. You, as Pat Payne's secretary, are responsible for maintaining the record of visitors to her office. In order to keep an accurate record, make the appropriate entries on the visitors' log.

SITUATIONS--JANUARY 24

9:50 a.m.	Norman McCarthy, Eastern Division Manager, arrives to see Pat Payne concerning past-due accounts. He is escorted to Payne's office at 10:05 a.m. and departs at 10:35 a.m.
10:10 a.m.	Jan Michael, Investment Counselors, Inc., (742-6666), arrives and wants to see Pat Payne regarding a financial matter. Ms. Michael waits ten minutes and schedules an appointment to see Ms. Payne on another day. She departs at 10:33 a.m.
10:15 a.m.	Donna P. Lloyd, salesperson, Lloyd and Ogden Products, Inc., (886-5141), requests to see Payne regarding a personal matter. She is escorted to Payne's office at 10:40 a.m. and departs at 11:40 a.m.
1:50 p.m.	T. W. Wilson, El Paso Branch Manager, (456-7890), arrives for a 2 p.m. appointment with Payne regarding an upcoming project. He is escorted to Payne's office at 2 p.m. and departs at 3:10 p.m.
3:30 p.m.	Pat Long, research associate, extension 5120, requests to see Payne on company matters. Ms. Payne asks that Long return later. Long departs at 3:40 p.m.
4:00 p.m.	Adam Goldsmith, Vice President, Lanzy's Service Stations, Paris, Texas, (123-4567), requests to meet with Payne regarding promotional strategies. Lanzy is escorted to Payne's office at 4:05 p.m. and departs at 4:25 p.m.
4:25 p.m.	Pat Long returns to see Ms. Payne. She is escorted to Payne's office at 4:30 p.m. and departs at 5:20 p.m.

ACTIVITY SHEET

Activity 2

VISITORS' LOG

Date	Name	Firm (Include Telephone No.)	App't. Yes/No	Purpose of Visit	Time of Arrival	Time Escorted	Time Departed

ACTIVITY SHEET

Activity 3

The following situations occurred on January 24. Using the information provided on the Student Checksheet and on the resource and activity sheets for Activity 2, respond to the questions asked below. Be sure that your responses are both brief and complete.

1. In Activity 1 you scheduled Ms. Payne to be in a staff meeting at 9 a.m. for approximately 30 minutes. Why is there no entry on your Visitors' Log for this meeting?

2. Jan Michael of Investment Counselors, Inc., arrived at Ms. Payne's office at 10:10 a.m. but left without seeing Ms. Payne. What probably happened that caused Ms. Michael to wait for 10 minutes and then leave before seeing Ms. Payne?

3. Donna P. Lloyd of Lloyd and Ogden Products, Inc., arrived at Ms. Payne's office at 10:15 a.m. and met with Ms. Payne at 10:40 a.m. Since Ms. Lloyd did not have a prearranged appointment, why was she able to see Ms. Payne?

4. In Activity 1 you scheduled a luncheon meeting for Ms. Payne with three members of the local Association of Architects. Why is there no notation of this meeting on your Visitors' Log for January 24?

5. Why was Pat Long, who arrived at 3:30, not able to see Ms. Payne until 4:30?

6. Since Adam Goldsmith of Lanzy's Service Stations did not have a prearranged appointment, what had occurred that enabled him to see Ms. Payne shortly after he arrived at 4 p.m.?

7. On January 7, Ms. Payne had asked you to put a reminder on her calendar about a PTA meeting at 5:30 p.m. on January 24. Since Pat Long did not depart until 5:20 p.m., Ms. Payne probably was not able to attend this meeting. What was your responsibility for keeping Ms. Payne on schedule so that she could attend this meeting?